**TECHNICAL PROPOSAL**

**Part I - Particulars of the Proposer**

**1. Name of the Proposer:**

**2. Summary Information:**

(a) Date of formation**:**

(b) Address:

(c) Name, designation, telephone number and email address of person to be contacted in respect of any queries relating to information provided in this proposal:

**3. Staff Resources:**

*(please also provide the number of staff)*

**4. Core business and services offered by the Proposer**

**Part II - Details of the Work Proposal**

**5. Summary**

5.1 Stage 2: Awareness Building and Stage 3: Capacity Building of the 2017 Shared Value Initiative  
*(Please* ***summarise how you will develop, plan, organise, manage and deliver the Assignment*** *consisting of the programme under Stage 2 (i.e. 2017 Forum) and Stage 3 (i.e.  visits, workshops and coaching sessions); and provide a* ***2017 Forum programme outline*** *suggesting the speakers and facilitators. It is essential to* ***name the proposed keynote******speaker(s)****, who should be prominent Shared Value thought leader/ pioneer(s), to be invited and indicate their availability for the 2017 Forum and indicative speaking fees if known.)*

5.2 Views/ observations on the development and challenges of CSV in Hong Kong as well as how to engage businesses in participating Stages 2 and 3.

5.3 Overall Communication Stratey of the 2017 Shared Value Initiative  
*(Please* ***outline the communication strategy*** *summarising how you will publicise the Shared Value Initiative to the target participants before the 2017 Forum, and continue the momentum for 2017 Forum, visits, workshops and coaching sessions. It should demonstrate your* ***added value and effectiveness of the services*** *to be provided, including concrete angles, strategies, channels and expected impact in term of media coverage. Please* ***suggest a tag line*** *for the Shared Value Initiative.)*

**6. Experience of the Proposer in relevant services in the past five years**

*(Please state the proposer’s experience in projects of similar nature and scale to the 2017 Shared Value Initiative, and the connection with the business sector. Please also give the name, period, brief description and service scope of the relevant projects.)*

**7. Composition and experience of the Team**

*(Please state the Team composition, categorising into Team Leader and Team Members. For each of them, please describe the relevant experience in handling projects of similar nature and scale in the past four years for the Team Leaders and past two years for the Team Members, preferable to have sound knowledge of Shared Value, connection with the business sector, developing of business strategies, understanding of social issues, and language proficiency (i.e. both English and Chinese (including Cantonese and written Chinese) or Chinese only or English only). Please also state the estimated mandays of each Team Member for this Assignment. The person(s) named must be the person(s) who will actually be involved in the work.)*

7.1 Team Leader with a minimum of four (4) years of relevant experience

7.2 Team Members with a minimum of two (2) years of relevant experience

7.3 The Network/ Partner Organisations

*(It is necessary to propose the partner organisations for Stages 2 and 3 and how you engage them. It is preferable that the Project Manager can engage partner organisations other than the TF members and stakeholders given as examples in paragraph 5.7 in order to broaden the horizon of the programmes. Please also state the strategic advantages of your network in delivering the required services.)*

**8. Work programme/milestones**

*(Please give indicative timelines and deliverables to be produced at various programmes of the Assignment)*

**9. Other information and suggestions related to the service delivery**

*(Any other information that may assist in the evaluation of the proposal)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Signature of Person Authorised to sign for and on behalf of the Proposer: | : |  | Date | : |  |
|  | (Name and Post title)  (with the Company’s chop where applicable) |  |  |  |

**FEE PROPOSAL**

|  |  |  |
| --- | --- | --- |
| **Item**  **No.** | **Description** | **Service Fee**  **(HK$)** |
| *All-inclusive Service Fee* | | |
| **1** | **2017 Forum** |  |
| **2** | **1st round of Visits, Workshops and Coaching Sessions** |  |
| **3** | **Communication Strategy and Publicity of the Shared Value Initiative** |  |
|  | **Sub-total (a) (Item No. 1 to 3):** |  |
| **4** | **2nd round of Visits, Workshops and Coaching Sessions** |  |
|  | **Sub-total (b) (Item No. 4):** |  |
|  | **Total (c) [Sub-total (a) + Sub-total (b)]:** |  |
| *Optional Item – Additional Service Fee (Note)* | | |
| **5** | Design and production for every four pages of the 2017 Forum booket in addition to the minimum 12-page content as specified in para. 6.3(a)(x) and Annex B |  |
|  | **Unit rate for optional item (d):** |  |
|  | **Total (e), estimated [(d) x 20 ÷ 4]:**  *(for the 13th to 32nd(Note) pages of the 2017 Forum booklet)* |  |
|  | **Grand Total [Total (c) + Total (e)]:** |  |
|  | Remarks if any |  |

Note

Solely for evaluation purpose, it is assumed that the 2017 Forum booklet contains 32 pages. As mentioned in Annex B, the exact number of pages and any addition of pages will be confirmed upon mutual agreement between the Trustee and the Project Manager.

|  |  |  |
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| Name of Proposer : |  | |
| Address: |  | |
| Signature of Person  Authorised to sign for and on behalf of the Proposer: |  | Company chop  (where applicable) |
| Name in block letters: |  | |
| Position : |  | |
| Date: |  | |

**CONSENT TO DISCLOSURE**

**To: The Trustee of the Social Innovation and Entrepreneurship Development Fund (Trustee)**

**Re: Provision of Project Development, Management and Publicity Services on Delivering the Shared Value Initiative to the Trustee of the SIE Fund**

|  |
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|  |

We, [*insert the name of the company*], hereby irrevocably authorise, consent and agree that if the Trustee agrees to engage us to provide the captioned services to the Trustee of the Social Innovation and Entrepreneurship Development Fund (SIE Fund), the Trustee, may, whenever it considers appropriate or upon request by any person (written or otherwise), disclose to any person in such form and manner as the Trustee deems fit:

1. the all-inclusive fixed service fee payable to us by the Trustee in respect of the captioned services;
2. the fee proposal submitted by us to the Trustee on *[Insert the relevant date]*; and
3. our engagement by the Trustee under the Contract; our names of and our sub-contractors appointed or engaged by us to perform any part or parts of the capitioned services in accordance with the Contract, or to advise or assist in relation thereto; and description of the capitoned services.

We hereby irrevocably waive and forego our right, if any, to bring any claim or action against the Trustee for any losses, damages, costs, fees, charges, expenses, liabilities, demands, proceedings and orders (including, wihtout limitation, any legal fees and expenses) that may arise out of or in connection with such disclosure by the Trustee.

Date this day of 2017

|  |  |  |
| --- | --- | --- |
| SEALED with the Common Seal of [*insert the name of the company*] and SIGED by [*insert the name(s) of the signator(ies)*], in the presence of :- | ) ) ) ) ) | ( affix common seal of the company) |

|  |  |
| --- | --- |
| Signature of Witness: |  |
| Name of Witness: |  |
| Occupation/Designation: |  |
| Address: |  |

**CONSENT TO DISCLOSURE**

**To: The Trustee of the Social Innovation and Entrepreneurship Development Fund (Trustee)**

**Re: Provision of Project Development, Management and Publicity Services on Delivering the Shared Value Initiative to the Trustee of the SIE Fund**

|  |
| --- |
|  |

We, [*insert the name of the company*], hereby irrevocably authorise, consent and agree that if the Trustee agrees to engage us to provide the captioned services to the Trustee of the Social Innovation and Entrepreneurship Development Fund (SIE Fund), the Trustee, may, whenever it considers appropriate or upon request by any person (written or otherwise), disclose to any person in such form and manner as the Trustee deems fit:

1. the all-inclusive fixed service fee payable to us by the Trustee in respect of the captioned services;
2. the fee proposal submitted by us to the Trustee on *[Insert the relevant date]*; and
3. our engagement by the Trustee under the Contract; our names of and our sub-contractors appointed or engaged by us to perform any part or parts of the capitioned services in accordance with the Contract, or to advise or assist in relation thereto; and description of the capitoned services.

We hereby irrevocably waive and forego our right, if any, to bring any claim or action against the Trustee for any losses, damages, costs, fees, charges, expenses, liabilities, demands, proceedings and orders (including, wihtout limitation, any legal fees and expenses) that may arise out of or in connection with such disclosure by the Trustee.

Date this day of 2017

|  |  |  |
| --- | --- | --- |
| SIGNED, SEALED and DELIVERED as a DEED for and on behalf of [*insert the name of the proposer*] by [*insert the name(s)of the signator(ies)*], in the presence of :- | ) ) ) ) ) |  |

|  |  |
| --- | --- |
| Signature of Witness: |  |
| Name of Witness: |  |
| Occupation/Designation: |  |
| Address: |  |